



America's Specialty Beer Company

11901 NW 14TH COURT
Pembroke Pines, FL 33026
(954) 437 2801 / fax (954) 437-2802

TO: Ana Figueroa

FROM: Nelson Quintero

DATE: May 22, 2003

RE: Hispanic Survey

In reference to your questions regarding the Hispanic media survey my personal opinion is that Hispanic media should be maintained separate from the general market. The Hispanic market is a different segment and should be targetted differently. *In the beer industry we face these challenges everyday trying to cross over to a complex ethnic market with such a Latin American influx and diversity. We are struggling trying to convey the same message.*

In reference to Radio, the audience of most listeners are probably working people or traveling in vehicles. During the most busy traffic hours and lunch time most people are listening to the radio. This is a key time for messages and commercials to get across. For example; lunch hour at any restaurant, bar or café usually has a radio station playing. I think today's TV viewer's are looking for specific shows, movies or the nightly news.

Ana, I hope this information helps you with your survey and please understand this is my opinion and not of Labatt USA.

Sincerely Yours,

Nelson Quintero
District Manager
Southeast Florida



GLENDALE NISSAN

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Glendale, California 91204
(818) 240-6000
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Mailing Address:
828 South Brand Blvd
Glendale, California 91204
E-mail: gni@sageauto.com

May 21, 2003

Federal Communications Commission
445 Twelfth St. South
Washington, D.C. 20554

To Whom It May Concern:

My name is Marci Neill I am the advertising coordinator for Glendale Nissan/Infiniti.

I have been asked to comment on whether the U.S. Hispanic media market is a separate market, for the purpose of assisting the FCC in its ongoing review and analysis of the pending merger of Univision Communications and Hispanic Broadcasting Corporation.

The first and most obvious example would be separate languages. From there the list goes on and on to include the following, separate location, population, growth rate, income level, brand preferences, and cost basis, to name just a few of the reasons why as an advertiser it is critical to be able to target Hispanic media, both TV and Radio as a separate market.

I hope the Commission will take these factors into consideration when reviewing the Univision/HBC merger.

Sincerely,

Marci Neill
Advertising Coordinator



Toyota of Manhattan

608 West 57th Street, New York NY 10019 • Sales/Service 212-399-9600 • Fax 212-977-9144



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and operated
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Nissan

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Bay Ridge
Chrysler

Bay Ridge
Lincoln/Mercury

Bay Ridge
Jeep

BROOKLYN, NY
Fordham
Toyota

WESTCHESTER, NY
Westchester
Toyota

NEW JERSEY
Freehold
Hyundai

Freehold
Jeep

Freehold
Mitsubishi

Route 22
Honda

Route 22
Nissan

Route 22
Toyota

Hudson
Honda

To Whom It May Concern,

My name is Jaime Amoroso, general manager of Toyota of Manhattan. I've been in automotive sales for over 15 years.

I've been asked to give my opinion on the question, "Do Hispanics in United States represent a unique market?" The question is been used in the consideration of the pending merged between Univision Communications and Hispanic Broadcasting.

The answer is clearly "YES". While we are Americans we are also Hispanics with so many different things that make us unique such as the foods we eat, our traditions, our culture and so much more. We have our own separate language with our own tastes, preferences and brand awareness. We have our own population with it's own unique growth rate.

We have distinct radio, television stations, and programs that appeal specifically to us. These stations and programs broadcast directly to our community in our language with it's own cost base, discreet demographics and targets. It is unique and separate.

As the F.C.C. reviews the Univision/HBC merger I hope the information highlighted here will help provide direction and the right decision to this most important question.

Sincerely,


Jaime Amoroso



Sid Paterson
Advertising, Inc.

June 2, 2003

To Whom It May Concern:

I've owned and operated a radio and TV buying service in New York City for many years.

I'd like to share my thoughts with you concerning the Hispanic market in the hopes my comments will be useful in the Commissions consideration as it reviews the Univision/HBC merger. The central point is the US Hispanic media market is a separate entity. First, the radio and TV stations which make up this market deal a separate consumer base and communicate to it in a different language. Secondly, the markets population base differs as does its brand awareness and cost structure.

Turn the channel-tune your radio. Your eyes and ears should convince your mind and heart this truly is a distinct market.


Sid Paterson

100 Madison Avenue
9th Floor
New York, NY 10016
Tel 212.795.9600
Fax 212.779.7301

Miami, May 21, 2003
To Whom it may concern

I am Gonzalo J. Gonzalez, Managing Officer at BVK/Meka in Miami. My experience in the advertising industry includes over 15 years working with most product categories in the United States, Spain and Latin America.

BVK MEKA is one the leading Hispanic advertising and Public Relations marketing firms, and the Hispanic Division of BVK in Milwaukee, ranked among the top 50 Advertising Agencies in the United States.

Our current client list for the US Hispanic market include SouthWest Airlines, Sprint PCS, Pfizer, South East Toyota, Samsonite, Samsung and the Florida Anti-Tobacco campaign among others.

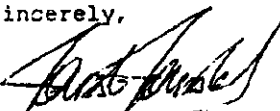
I have been asked to comment on whether the U.S. Hispanic media Market should be considered as a separate market. Not only for the proven effectiveness of the Spanish Language in communicating messages, but also because of the different media habits and cultural relevance of programming, the Hispanic media is and should be considered separate when planning, buying and evaluating broadcast media.

This fact has been proven by numerous research developed by the most prestigious research companies, such as Nielsen, Roslow Institute, Scarborough, Strategy research, among others.

As a result of this, companies that measure and monitor broadcast media, such as Nielsen and Arbitron, has adapted their methodology in term of measuring Hispanics across the country, publishing separate Hispanic books with the results of their surveys.

I hope the Point of View will be useful in the consideration of the U.S. Hispanic media market as a separate relevant market, and feel free to contact me should you need to further discuss this matter.

Sincerely,



Gonzalo J. Gonzalez
Managing Officer

bvkmeka 848 brickell avenue, 4th floor > miami fl 33131
305 3720028 > 3720880 > www.bvkmeka.com



May 21, 2003

Federal Communications Commission
445 12th Street, S.W.
Washington DC, 20554

To Whom It May Concern:

It is with great concern that our firm has approached you regarding the proposed merger between HBC and Univision.

As a boutique firm in Coral Gables providing counsel in the areas of Advertising, event marketing and public relations, we foresee the ramifications of this proposed merger. We are a young firm, comprised of individuals who have been active in the advertising industry in the South Florida marketplace for over a decade, particularly in Hispanic media. We live in this market, and understand the unique elements it's comprised of including how cyclical it is. The South Florida market will severely suffer if this merger happens.

Our philosophy rests on the shoulders of innovation and we stand strong in our focus on providing unique and cost effective methods for our clients to achieve their marketing goals. However, we believe that the uniting of the nation's number-one Spanish-language television operator and the number-one Spanish-language radio owner resembles the Clear Channel model. Formulas such as this have truly made it difficult for agencies and local businesses such as ours to thrive in a marketplace where as it relates to placing media, there are very few competitors.

We are convinced that with such a merger taking effect, many areas of our industry will be directly affected. Our concerns are the strong negative effects on both the general as well as the Hispanic market. We are specifically concerned about the business practices and methodology that will ultimately impact the consumer.

We would also like to comment on the issue of whether the Hispanic media market is a separate one. Our firm firmly believes it is. Just to begin, this is a market that has its own consumer base that possess their own tastes, brand awareness, brand preferences, media, cost basis, population, and language. How can one ignore the facts listed above? Including both television and radio, it is evident that this market has its own unique set of separate characteristics, its own buying power, and its own consumer psychographics.

We implore the Commission to consider the ample evidence aforementioned. My firm could not feel more strongly about this matter. We respectfully seek your assistance in protecting the industry comprised of agencies and advertisers alike who realize how critical this matter is and how this proposed merger will affect the future of our industry. We trust in the judgment of the Commission and rely on its plight to protect the overall public's interest. Please take our plea into consideration. If need be, our firm is at your disposition as it relates to the Commission's consideration of the U.S. Hispanic media market as a autonomous market and its review of the Univision/HBC merger.

Sincerely,

A handwritten signature in dark ink, appearing to read "Liza M. Santana".

Liza M. Santana
President, Creativas Group Inc.

www.creativasgroup.com
Email: lmsantana@creativasgroup.com
Office 305.858.3880 Fax 305.858.3882
1395 Coral Way, Suite 2-J, Coral Gables, FL 33145



The Menda Group
advertising services

May 22, 2003

To Whom It May Concern:

As an advertising agency in the South Florida market for over 7 years, and as an advertising professional for over 13 years, I am always asked the same question from many of my advertisers: "How can I best reach the Hispanic market?"

The question would seem to have a simple answer: "Just through some budget dollars to a couple of Hispanic stations, translate our current spot (some advertisers actually use their English spot in Spanish language stations), and go with it!"

The more I see these situations occur, the more I realize that there are still many people in South Florida and the U.S. that still don't get it.

The Hispanic market is more than just a true and separate market from the general market. It has several "sub-markets" within itself. It is not suffice to think that with just one campaign, or one spot, or one theory, we can reach the entire Hispanic market. Hispanics in the U.S. are truly diverse. South Florida alone has possibly the most diverse Hispanic market in the country, comprised mostly of people from the Caribbean, Central and South America.

Unquestionably, the same applies to all the Hispanic markets across the U.S. Hispanics have become an important part of our population with their rapid growth, as well as their increasing buying power as consumers. This is a market with different cultures, ideas, values and customs.

Therefore, it is critical that Hispanics be considered as a separate market in order to reach them effectively and allow prospective advertisers to communicate with this powerful and evolving segment of our country.

Thank you

Tony Garcia
President
The Menda Group

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New York, New York 10017
www.hnmediaandmarketing.com

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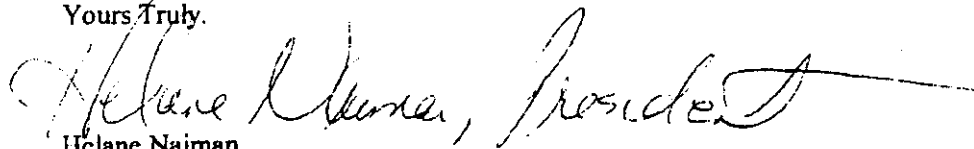
To Whom It May Concern,

I'm Helene Naiman. I have worked in media in New York City for over twenty five years and have for the past five years owned my own ad agency/buying service, HN Media & Marketing, Inc.

I've been asked to comment on whether the U.S. Hispanic media market is a separate market for the purpose of assisting the F.C.C. in its ongoing review and analysis of the pending merger between Univision Communications and Hispanic Broadcasting Corporation. In my opinion it certainly is. Here are just a few reasons why. The Hispanic population has separate tastes. It differs in brand awareness with a uniquely different consumer base. Hispanics in the United States have their own media. The market includes both radio and television stations that broadcast in the Spanish language.

I hope this information is useful to the Commission in their consideration of this issue. As the FCC reviews the question of whether Hispanics in the United States are a separate market the answer is clearly-yes.

Yours Truly,


Helene Naiman
President



accentmarketing

May 27, 2003

To whom it may concern:

My name is Migdalis Santana and I am the Media Director for Accentmarketing, a Hispanic advertising agency located in Coral Gables, Florida. I have been involved in the Hispanic Advertising business for more than 30 years, most of those as a Media Director for different agencies.

I have been asked for my opinion and comments on whether the U.S. Hispanic media market is a separate market.

During all my years in the business I have had multiple opportunities to experience the differences of this market versus the Non-Hispanic market in the U.S.

- The strongest and most obvious difference has been the Spanish language preference among Spanish dependents, Spanish dominants and bilingual Hispanics. Even the most acculturated Hispanics have showed their preference for the Spanish language and their appreciation of advertisers that communicate with them in this language. Research has shown that Hispanics feel more comfortable with a commercial message communicated in Spanish. They understand it better and more important, are conscious of the advertisers' interest in communicating with them and competing for their business. This perception has made a real difference in the share growth of those advertisers in the Hispanic market. Large and consistent Hispanic media investments as well as dedicated community involvement efforts have generated growing market shares for advertisers. I have witnessed this success with different product categories that I have worked with throughout the years, including package goods, special services and high-ticket items.

- Being Hispanic is a cultural issue beyond the day-to-day use of the language and despite the levels of acculturation. The pride of being part of the Hispanic culture has overcome all the differences between the multiple Hispanic nationalities that comprise this market. The Hispanic culture has several constant values that have been permanent across all groups and levels of acculturation throughout the years: Spanish language, Spanish music, family ties, religion, tradition, etc.

As will be shown below, there is ample evidence and factual corroborations to conclude that the U.S. Hispanic media market is a separate market.

-The growth of Broadcast Hispanic Media is the strongest proof of this market's uniqueness. Instead of disappearing or being reduced in number, the Spanish language television and radio stations continue to grow and get stronger in all markets. There are currently four over the air Broadcast TV stations servicing the different Hispanic markets. There are also more than four Hispanic cable networks and multiple local independent stations. Univision ranks as the fifth most watched TV network in the U.S. and this is not just among the Hispanic community. The same situation goes for Hispanic radio. There are more than 664 Hispanic radio stations in the U.S. Several Hispanic stations rank among the top 5 in Arbitron's audience books, in markets like L.A. and Miami.

-This growth of outlets and audience figures is the best proof that Hispanics need and prefer Spanish language media vehicles that offer them the kind of programming that is relevant to their culture and that keeps them informed of everything that is happening in the U.S., in the world and most important in their Hispanic communities as well as their countries of origin.

I hope the information provided will be useful in the consideration of the U.S. Hispanic media market as a separate relevant market.

Sincerely,

Migdalis Santana
VP Media Director

LA PUERTA DEL SOL
SUITE 100
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CORAL GABLES, FL 33134
(305)461-7177
FAX (305)461-0077

May 23, 2003

Mr. Raul Alarcon Jr.
Chairman
Spanish Broadcasting System
2601 South Bayshore Drive
Penthouse II
Coconut Grove, FL 33133

Dear Raul,

Enclosed is a synopsis of my position paper on the U.S. Hispanic market. I have delivered this or very similar presentations on numerous occasions to a broad spectrum of general business and Hispanic marketing audiences. The most recent was at the Central Florida Hispanic Chamber of Commerce.

I have edited out only my personal (humorous) anecdotes; actually, they were the best part.

Best regards,

A handwritten signature in black ink, appearing to be 'Raul', with a long horizontal flourish extending to the right.

A COUNTRY WITHIN A COUNTRY

The U.S. Hispanic market is frequently referred to as "a country within a country...larger than Canada... the fourth largest Spanish speaking country in the hemisphere larger than Peru, Venezuela, Chile or Ecuador." 42.6 million strong (including Puerto Rico), the population is expected to grow by more than 1.7 million per year. That's 100,000 people every three weeks or 5,000 every day.

Hispanic purchasing power exceeded \$630 billion in 2002. In and of itself, it represents the 9th largest economy in the world, larger than the GDP of Brazil, Spain and even Mexico. All indices and economic measurement standards reflect growth and increased prosperity. In the decade between 1979 and 1999, the number of Hispanic families reaching the middle class (defined as those earning between \$40,000 and \$140,000) increased 71.3% to 2.5 million, fully one-third of the total.

The numbers get even more interesting in terms of business ownership. According to American Demographics Magazine, Hispanics now account for the largest share of minority entrepreneurs in the United States, owning 40% of all such businesses. The Census Bureau's last economic census reported 1.2 million Hispanic owned businesses with aggregate revenue in excess of \$186 billion. The 2002 estimate put the figure at 2.3 million with \$380 billion in sales. In 2001, the census also reported Hispanic labor-force participation at 80.4% (FYE 2000), higher than non-Hispanic white males as a whole.

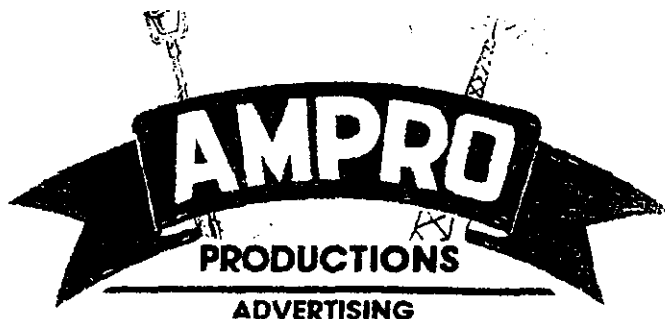
It is evident that even official agencies consider this market a discrete entity within the larger marketplace measured and reported accordingly. And while other minority markets are similarly measured in a number of areas, the Hispanic market stands alone as a self-contained, differentiated, "country-like" entity within U.S. borders; one from which specialized disciplines, professions, governmental institutions, NGOs and even foreign policy initiatives, have arisen and will continue to arise well into the foreseeable future. This is not a matter of opinion. It is a matter of fact extremely well grounded in logic, as we shall see:

1. Let's consider the other two large minority segments in the United States, African-Americans (excluding Haitian-Americans) and Asian Americans. African-Americans speak English almost exclusively. There are few direct linkages to African countries of origin. Non-African Americans may easily communicate and participate in this sub-segment at will. They are tied to the mainstream culture by language if not by color.
2. The Asian-American segment is composed by a multiplicity of cultures divided by language – Chinese (Mandarin and Cantonese), Japanese, Korean, Vietnamese, Hindi, Bengali, Urdu, Malay, Punjabi – the influence and economic advantages (cost-effectiveness) that spring from critical mass are elusive if not impossible. Therefore, other than grassroots marketing or media outlets serving small

enclaves, any Pan-Asian network or national print vehicle would be either highly fragmented in a multiplicity of languages or require English as the common denominator.

3. Language is the single most important characteristic of culture and Hispanics in the United States are united by a common language traced to Spanish colonizers regardless of whether these are viewed as ruthless conquistadors (Mexico) or brothers from the mother country (Cubans). If this were not the case, neither national broadcast networks nor national print media would be viable business models. This isn't to say that there aren't English dominant Latinos, but rather that for marketing and communications purposes we include them in the mainstream universe just as we exclude non-Spanish speakers from the Hispanic consumer pool. Spanish dominant Latinos then, by necessity, must rely on Spanish language media even to exercise their right to vote; bilingual Latinos may choose either language based on content or self-identification. Considering that Latinos are basically absent from general market media, being depicted as less than 2% of all characters (while more than 12% of the population) and often in the most negative roles, bilingual Hispanics are practically compelled to turn to Spanish language media to see and/or hear themselves.
4. This cultural phenomenon known as Hispanic-America, and its need for in-language communications that respects and embraces our multiracial identities, musical preferences and folkloric richness created the Hispanic advertising industry. The Association of Hispanic Advertising Agencies was organized in recognition that ours is a marketing sector that could not and would not be well served by general market entities; the very same who for more than 30 years had been predicting with almost evangelical fervor our assimilation and demise. The truth is that Hispanic advertising and media professionals constitute a unique business specialty. As managers, we must have as thorough an understanding of the disciplines as our monolingual, general market counterparts and communicate in English with our clients, bankers, the IRS and the 21 year old brand manager who has never traveled outside of Indiana, yet transcreate, transform, interpret and connect with our consumers in Spanish, the language most likely to produce the sales and economic benefits sought by our clients. "Compre nuestro auto, nuestro jugo y traiga su dinero a nuestro banco." It's the American way. Consumer spending is the backbone of our economy. And let's be realistic, the mainstream population base is experiencing negative birth rates. All U.S. population growth is directly attributable to minority and immigrant sub-segments. The Census says so.
5. The wave of Hispanic agency acquisitions by general market firms shows that they were wrong about assimilation (which did not and will not take place), were wrong to remain intransigently monolingual as if it were a badge of honor and thus, with very few exceptions and these only in the multi-national arena, incapable of creating Hispanic divisions organically. Ultimately, they had to buy the agencies. Most were motivated by profit potential others to keep the market in check and under control.

6. The increasing acceptance of Mexican Matriculas, the strengthening of Radio Marti's signal, NAFTA and the proposed FTAA, point to Hispanic interests influencing the national agenda well beyond the Congressional Hispanic Caucus. This is understandable as Hispanics represent the country's largest pool of bilingual, transnational citizens. It may be a small percentage of the vast United States of America, but a critical component of the country's hemispheric – perhaps global – aspirations. A country within a country indeed.



May 20, 2003

To Whom It May Concern:

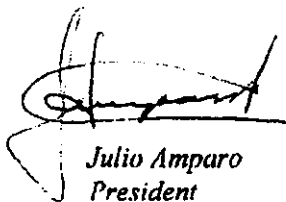
I am Julio Amparo. I have worked in the Hispanic market as an owner of an independent advertising agency for over 15 years.

I have been asked to comment on the pending merger between Univision Communications and Hispanic Broadcasting Corporation. An important question the F.C.C. is facing is whether or not the U.S. Hispanic market is separate market.

First, we speak a different language. We have our own consumer base, our own and separate tastes. As an owner of an ad agency I can tell you Hispanics have their own brand awareness for our own products, Our population growth is different, the cost structure of media is separate — we are a separate consumer base.

The Hispanic Media market— radio and TV combined — is a separate and distinct market. Listen and you will hear with your ears we are a separate market.

I hope my comments will be useful in the Commission's consideration of the US Hispanic media market as a separate relevant entity and in it review of the Univision/HBC merger.



Julio Amparo
President